

Survey of Customers & Non-customers: Satisfaction & Potential Changes

DECEMBER 2010

Methods

- Telephone Survey: December 26 - 28, 2010
 - 599 customers of and
611 non-customers of
Washington State Liquor Stores
 - Phone numbers were selected at random from the list of registered voter household. Survey respondents were over the age of 21, but not necessarily a registered voter.
 - Margin of sampling error: $\pm 4\%$
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Respondent Profile

In interpreting these findings, it is important to keep in mind the characteristics of the people actually interviewed. This table presents a profile of the 599 WSLCB customers and 611 non-customers interviewed for this survey.

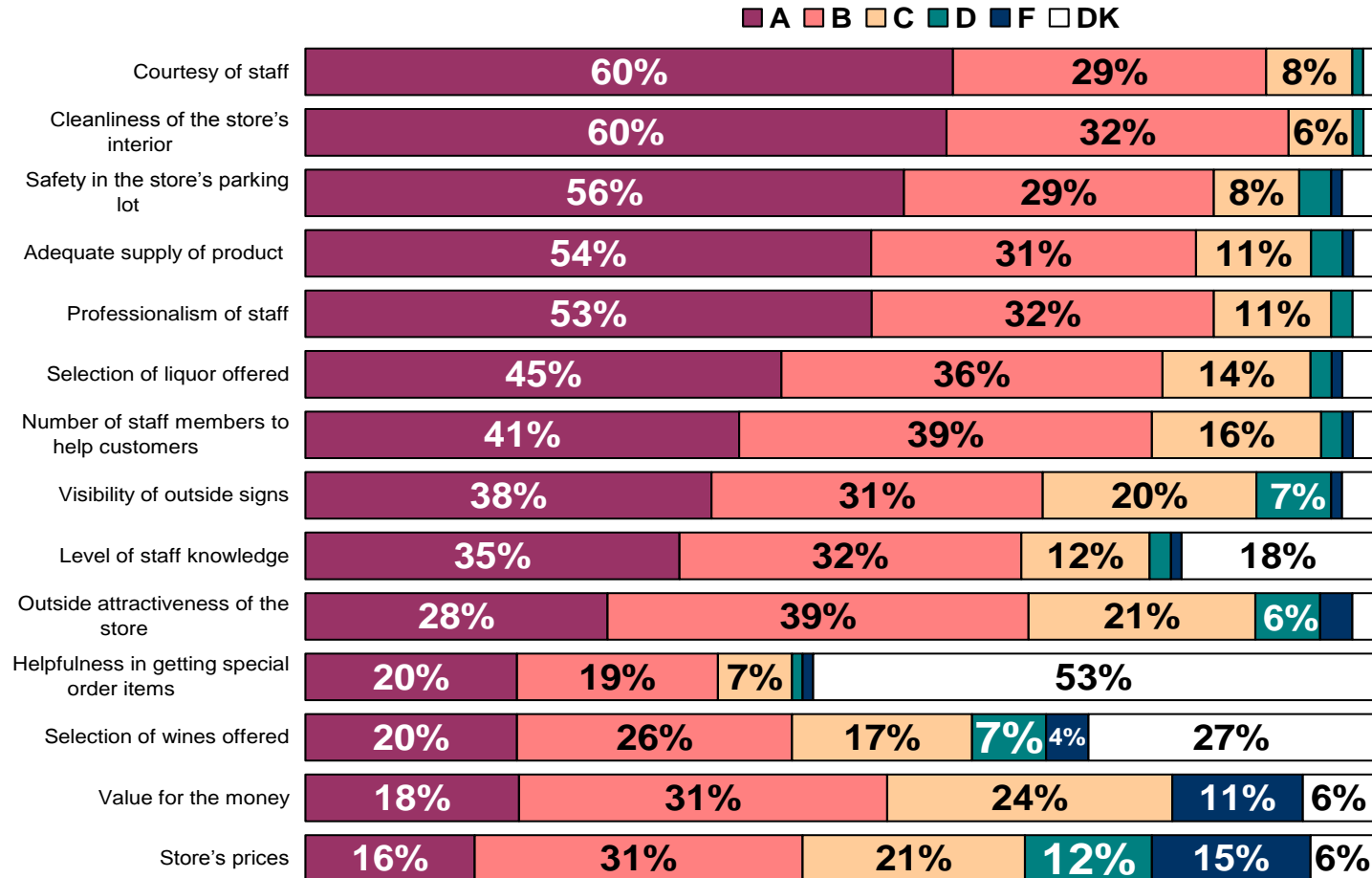
Note: Here and throughout this report, percentages may not add to 100%, due to rounding.

| | CUST | NON | | | CUST | NON | |
|-------------------|------|-----|---------------|------------------------|------|-----|-------------------------|
| GENDER | 48% | 43% | Male | CONSUME ALCOHOL | 96% | 33% | YES |
| | 52% | 57% | Female | | | | |
| AGE: | 10% | 8% | 21-35 | EMPLOYMENT: | 15% | 9% | Self-employed or owner |
| | 27% | 18% | 36-50 | | 27% | 21% | Private business |
| | 40% | 35% | 51-64 | | 18% | 13% | Public sector |
| | 23% | 38% | 65+ | | 8% | 8% | Not employed |
| | 1% | 1% | No Answer | | 1% | 2% | Student |
| | | | | | 29% | 46% | Retired |
| | | | | | 2% | 1% | No Answer |
| REGION | 31% | 28% | King County | HOUSEHOLD: | 34% | 28% | Couple with children |
| | 15% | 17% | Pierce+Kitsap | | 49% | 47% | Couple with no children |
| | 18% | 19% | No. Sound | | 4% | 4% | Single with children |
| | 18% | 15% | West | | 13% | 20% | Single with no children |
| | 18% | 21% | East | | 1% | 0% | No Answer |
| COMMUNITY: | 24% | 23% | Urban | INCOME: | 9% | 17% | < \$25,000 |
| | 34% | 31% | Suburban | | 20% | 24% | \$25 - \$50,000 |
| | 24% | 24% | Small Town | | 23% | 22% | \$50 - \$75,000 |
| | 19% | 20% | Rural | | 34% | 20% | \$75,000 + |
| | | 1% | No Answer | | 13% | 17% | No Answer |

Key Findings

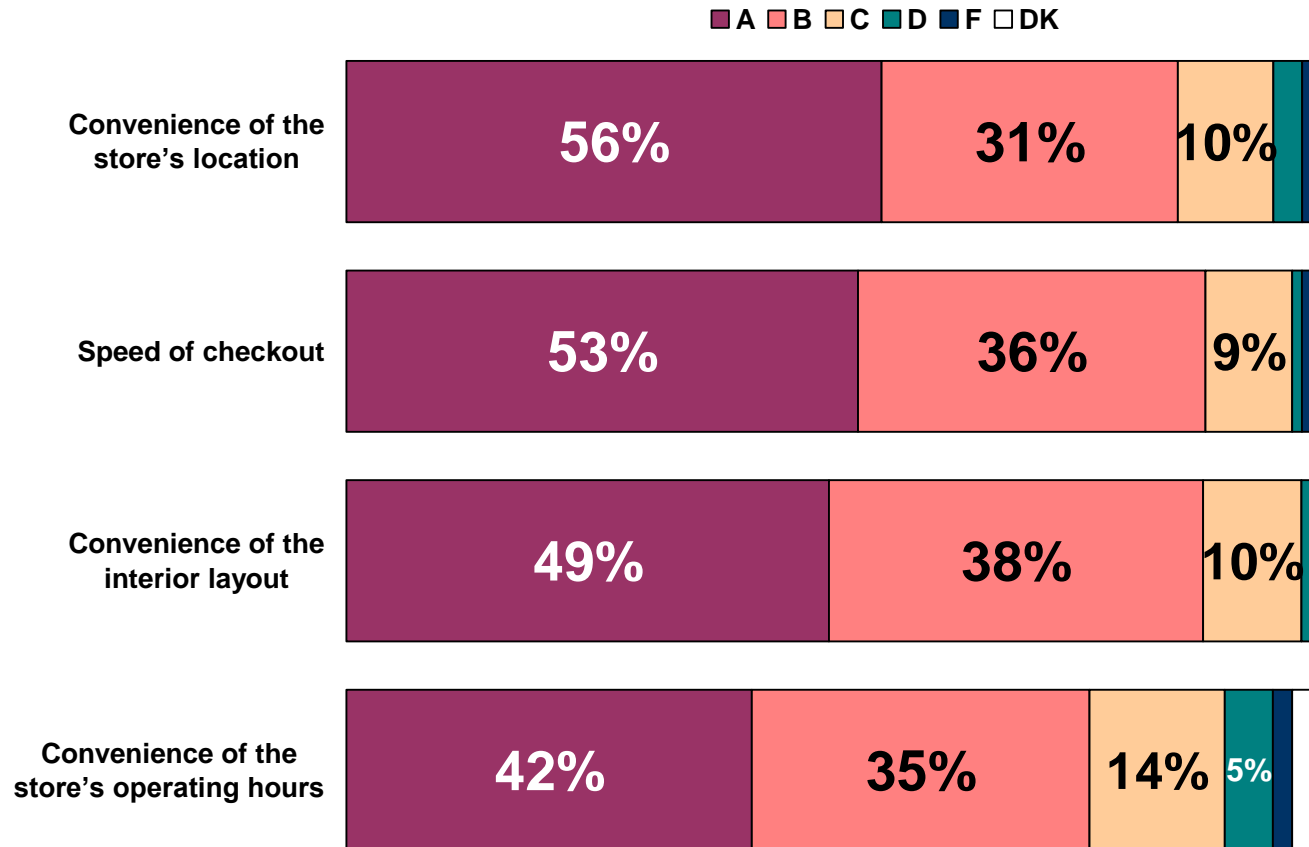
- ◆ **46% of all respondents shopped at a state liquor store in the last year**
 - ◆ **Half said shopping days “OK as is”**
 - ◆ **Stores got generally high marks from customers**
 - ◆ **High ratings for convenience**
 - ◆ **2/3 said there were the “right number” of liquor stores**
 - ◆ **Majority of customers supported suggested changes**
 - ◆ **Most Non-customers opposed every change**
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Courtesy, Cleanliness Got Highest Grades; Wine Selection, Value, Prices Scored Lowest



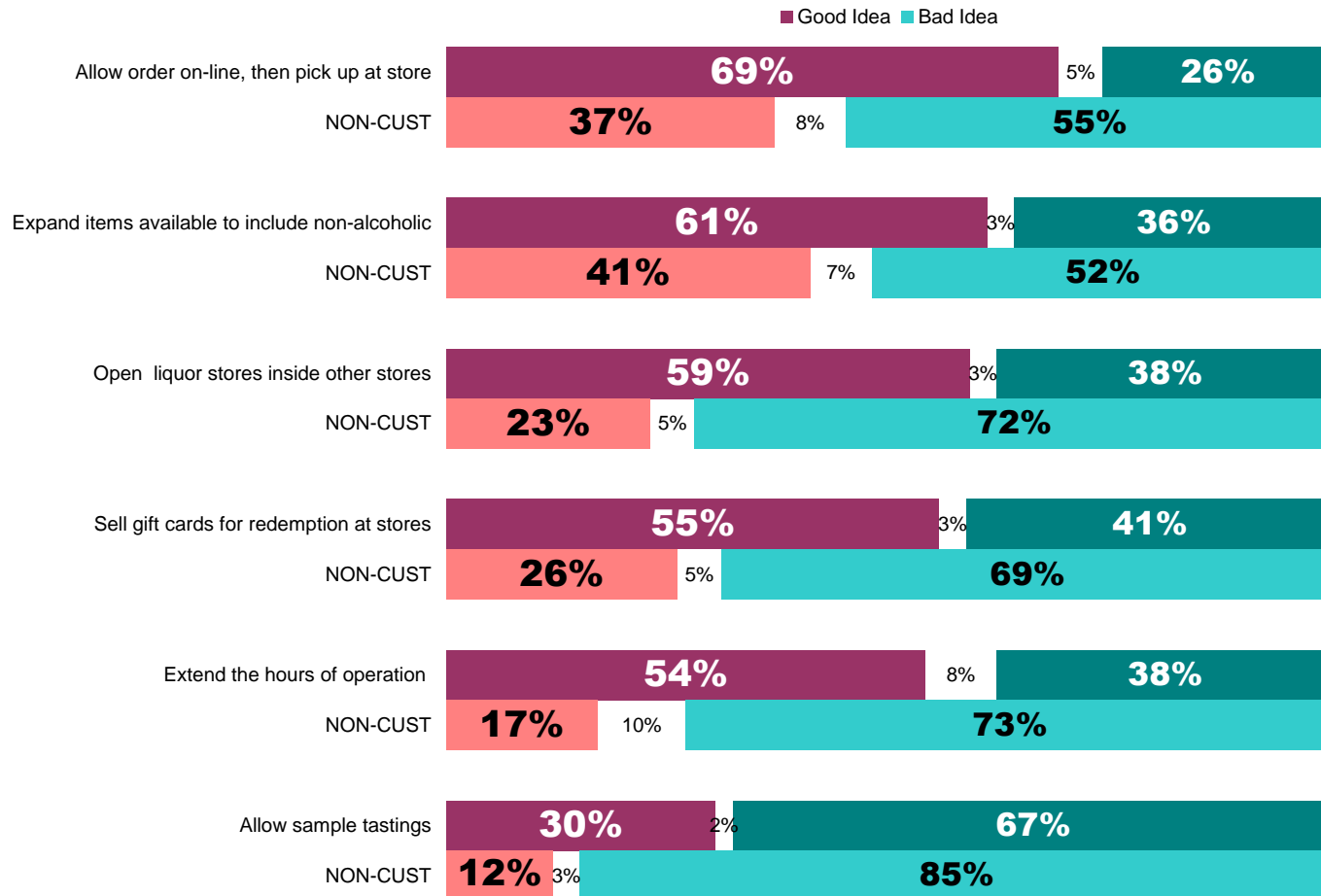
Q8: Now, I'd like to ask about your impression of the liquor store you shop most frequently. As I read a list of things about the store, I would like you to rate each one. We will use a letter grade system, like they use in school, where "A" is Excellent, "B" is Good, "C" is Satisfactory, "D" is Unsatisfactory and "F" is Failing.

Convenience Factors Mostly Graded A or B



Q10: Next, I'd like to ask you a few questions about customer convenience. Using the same grading scale as before, how would you rate...

Most Customers Support Most Suggested Changes; Most Non-customers Oppose



Q13: The state is considering some changes in the operation of its liquor stores. As I read a few of these, tell me whether you think that is a good idea or a bad idea.